The ORGANIZATION CHANGE Process
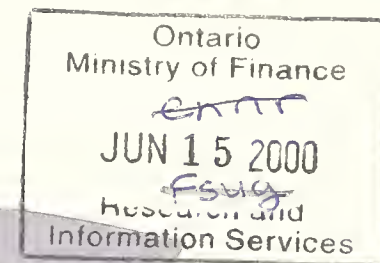
Prepared by the
Task Force on the Organization of Work,

Premier's Council on Economic Renewal

The
ORGANIZATION
CHANGE
Process

Task Force on the Organization of Work

Premier's Council on Economic Renewal

ALGG

PREFACE

Change. Sometimes it's called restructuring; sometimes renewal. We're constantly being told that our place of work is about to change, or that it is evolving, or that it has been reorganized. We keep hearing about how the economy is restructuring and that it will never be "business as usual" again. And there is no shortage of gurus out there to tell us where we should focus — "Total Quality Management", "Continuous Quality Improvement", the core business, invest in technology, try process reengineering, follow the precepts of the late J. Edwards Deming, adopt world class manufacturing, empower the workers, listen to the customer, become a learning organization, get "ISO 9000" certification — the messages come thick and fast. Which ones to listen to? Whose interests are being served? Which ones to act upon? How to act upon them or react to them?

The truth is that all organizations are in a process of change. No place of work is exactly the same from one day to the next. It is also the case that they are not all changing for the better. Some are being shaken to their roots; some are disappearing; many are shrinking. The result has been many workplaces that are "churning", going through contortions as they move through one "vision" after another or chase the latest restructuring or renewal fad. Few are changing in a positive sense, only somewhere between eight and 16 per cent of Ontario workplaces, according to our best estimate.

What we are talking about when we speak of change in the workplace is very simple. We mean doing things differently in ways that make the workplace better at what it is supposed to do and make it a better place for people to spend their working lives. The emphasis is on the *and*.

Underlying the material in this document is a value: Workplaces that are changing for the better are improving in two ways — as places which produce more effectively and which are becoming better places for people. Again, the emphasis is on the *and*. They are not being forced or are forcing themselves to become sweatshops, where working conditions are sacrificed to profits. Nor are the needs of the business being ignored to create a country club for people who work there. What they are doing is making progress, often unsteady and uncertain, to be both more effective and enriching places of work. They are finding that it is not an either/or proposition. More likely you get both or you get neither.

What have we tried to do here? We have described the process of workplace change in a way that is sufficiently general to be useful to all workplaces — for managers, workers and their representatives.

We didn't get caught in the specifics of telling a workplace to "implement the team concept" or "automate to the max" or "institute performance pay"; advice like that is often not appropriate. We have described a process that will respond to and incorporate the various agendas that exist in any workplace: the employer's, the worker's, and, where one is present, the union's.

We have produced a "map": a generalized guide based on decades of experience that can help an organization breathe new life into itself. Like any map, it doesn't tell you how or when to travel, or which specific route to take. All it can do is point the way and help avoid the most obvious missteps. And it can serve as a check on progress along the route.

Who is "we"? We are the people who have participated in the Task Force on the Organization of Work of the Ontario Premier's Council on Economic Renewal. We include representatives from the business world, labour, academics with expertise in organizational development, and consultant/practitioners who assist organizations through change. Building on our knowledge and practical experience, we've identified the generic components of durable change and described the process in a way that avoids the most common pitfalls. We have worked together to produce this "process map" and we are confident it constitutes an advance in our understanding, that it contains collective wisdom and represents a consensus among us.

If your workplace is unsatisfactory, either in terms of the results it is producing or in the quality of life experience it is providing for the people who make it up, this document is for you. It will suggest the steps which are necessary to get things moving. At the very least, it will help identify who needs to be involved in doing something to make it better.

We all have differing degrees of control and "voice" in our workplace. If the key players where you work share the sense that all is not well in the state of your workplace, take a look at the companion to this document — *A Tool for Dialogue About The Quality of your Workplace and The Organization of Your Work*. It can help you or your representatives start a process, one that we think will make your organization more effective and your work experience more fulfilling.

THE ORGANIZATION CHANGE PROCESS

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Note:

This document represents the efforts of the various constituents of the Premier's Council Task Force on the Organization of Work (TFOW) community to express clearly and simply what they see as the essential characteristics of a successful organization change process. It is a step by step road map to implementing significant organizational change. It is recognized that the model will never be complete. The current version has the general endorsement of the authoring working group, the task force and the Premier's Council on Economic Renewal.

INTRODUCTION

The following process map is a tool intended not to constrain, but to guide, the organization of work.

The map is not linear; it requires frequent looping back to reflect the learning that goes on as one moves forward in the process.

Each step in the process is important. That is not to say, however, that each step will have equal importance or demand equal attention. A step may take six months or six hours depending on the specific characteristics of the organization. The main phases of the change process can easily extend over a period of several years.

In practical circumstances, the process may begin with a Vision Statement and work backwards to Build a Foundation prior to Making Changes. The key issue here is that the tool has to be integrated with the parties' particular environment.
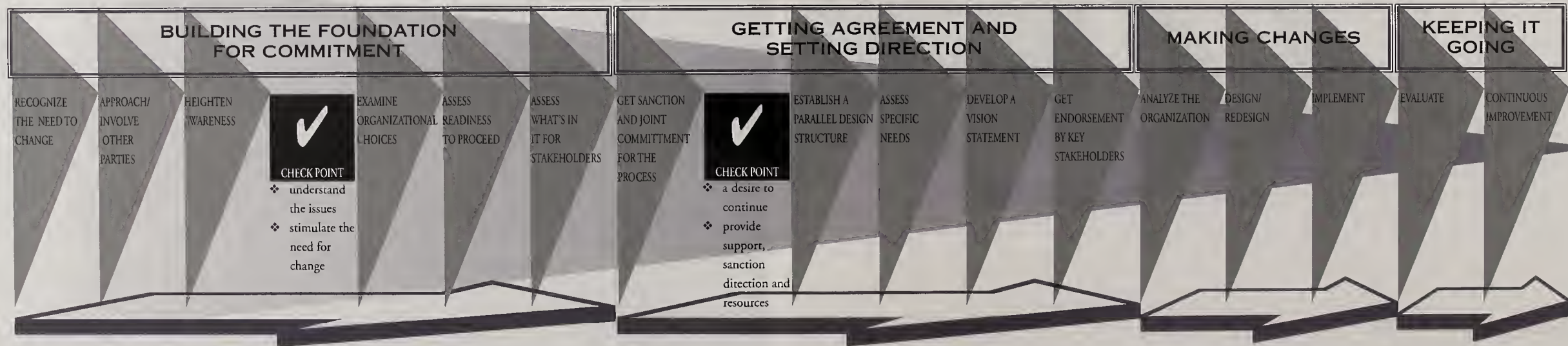
Early process relies on commitment and a preparedness to maintain flexibility so that the parties are open and can adapt to new learning as they move through the process. The change process likely requires that stakeholders learn to relate to each other in new and different ways.

The
ORGANIZATION
CHANGE
Process

ORGANIZATION CHANGE PROCESS

BUILDING THE FOUNDATION FOR COMMITMENT

GETTING AGREEMENT AND SETTING DIRECTION

MAKING CHANGES

KEEPING IT GOING

RECOGNIZE THE NEED TO CHANGE

APPROACH/ INVOLVE OTHER PARTIES

HEIGHTEN AWARENESS

✔ CHECK POINT
❖ understand the issues
❖ stimulate the need for change

EXAMINE ORGANIZATIONAL CHOICES

ASSESS READINESS TO PROCEED

ASSESS WHAT'S IN IT FOR STAKEHOLDERS

GET SANCTION AND JOINT COMMITTMENT FOR THE PROCESS

✔ CHECK POINT
❖ a desire to continue
❖ provide support, sanction ditection and resources

ESTABLISH A PARALLEL DESIGN STRUCTURE

ASSESS SPECIFIC NEEDS

DEVELOP A VISION STATEMENT

GET ENDORSEMENT BY KEY STAKEHOLDERS

ANALYZE THE ORGANIZATION

DESIGN/ REDESIGN

IMPLEMENT

EVALUATE

CONTINUOUS IMPROVEMENT

Building the Foundation for Commitment covers two phases.

The first is directed at recognizing the need to change and building relationships between the stakeholders involved.

The second involves examining the situation in which the organization finds itself to better appreciate its alternatives and what is at stake for everyone as they begin the change process.
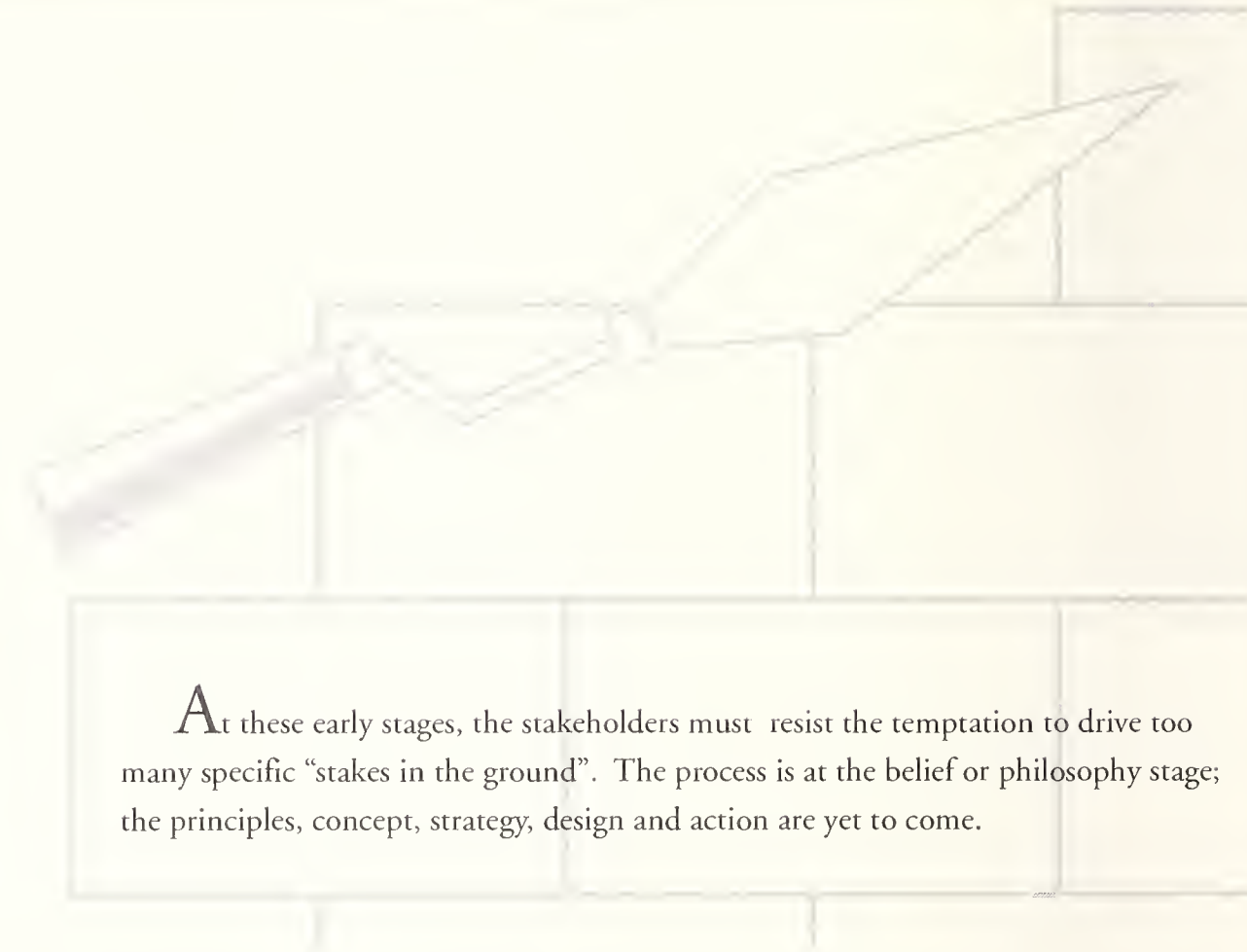
Between the stages, there is a need to check how the process is proceeding. This is the first of many occasions when this change process offers a caution about proceeding to the next phase before the organization and its relevant stakeholders are ready to do so. If a solid foundation for commitment to the change is never built, the price for proceeding before one should may be an early end to the change process or a "plateauing" after some initial accomplishments.
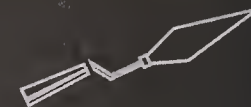
The first phase of Building the Foundation for Commitment is essentially a learning "muddle". It is fluid, not linear. In the *Heighten Awareness* mode, new stakeholders may be identified and approached and even the *Need to Change* may itself change. The change process may require people to learn to relate to each other in new ways.

At these early stages, the stakeholders must resist the temptation to drive too many specific "stakes in the ground". The process is at the belief or philosophy stage; the principles, concept, strategy, design and action are yet to come.

A significant number of organizations that embark on the change process do so because they have no choice — they are severely threatened and have no option if they wish to survive.

However, it is not necessary to wait until you are threatened to scan your environments, anticipate or manage change and deal with the organization of work in a proactive manner to exploit the opportunities it offers.

* Most organizations attempt change as a reaction to immediate danger. This may actually hinder successful change. More organizations should look to opportunities, and to the longer term.

Recognition may be driven by:

❖ a reaction to a current threat or through a strategic revisioning of the organization or a reassessment of your strengths and weaknesses.

❖ any of the key stakeholders (company, workers, union) based on:

    ❖ economic factors

    ❖ demographic or social factors

    ❖ social trends

    ❖ technological changes

    ❖ competitive pressures

    ❖ quality issues

    ❖ safety issues

    ❖ environmental factors

APPROACH/INVOLVE OTHER PARTIES

It is critical that all stakeholders who may affect or be affected by the change are identified. They must be communicated with, consulted, involved and invited to be in the change process from the beginning this is in progress efficiently and effectively.

Not all stakeholders will have equal status or participation in the process in every organization but the key stakeholders (generally workers, union and management, but potentially any of the others) must be involved. Corporate head office can be critical in the change process and it is important not to overlook it in the early stages.

The nature of the dialogue sets the tone for how future communication will take place. The parties must approach/involve each other and establish common and overlapping interests within their separate agendas. It is also important to appreciate each others' differences.

All of the stakeholders who may be part of/affected by the change must have their interests considered.

Other parties include:

❖ workers and their families

❖ unions (local, national and international)

❖ management (all levels)

❖ customers

❖ suppliers

❖ the community

❖ competitors

❖ special interest groups (environmentalists, etc.)

❖ government (all levels)

❖ shareholders (owners, Board of Directors)

At this stage the key stakeholders acquire knowedge about the need to change (the current threat or the future opportunity) and begin to make their commitment to the change process.

❖ knowledge may come from seminars, conferences, workshops, site visits, films, reading or industry/business analysis

❖ while communication among the stakeholders should be full and open, it may be necessary, in order to maintain the identity and integrity of an individual stakeholder, to learn and acquire understanding separately

❖ an expert/consultant in the field may be valuable as a connection to the outside world, to facilitate dialogue, etc

HEIGHTEN AWARENESS — COMMUNICATION, CONSULTATION AND INVOLVEMENT.

The objective is to share information and viewpoints among the key stakeholders as early in the process as possible to ensure that there is a common understanding (and consensus) for the need to change.

Those who will ultimately provide "sanction" for the change process must also be considered in the *Heighten Awareness* step.
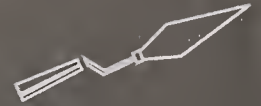
As the stakeholders move from one phase to another, they build their commitment to each other and the process. These are the early stages of building trust.

The key stakeholders must ensure that they jointly agree on the basis for proceeding.

It should also be understood that the parties may agree to proceed on the basis of agreement to disagree on certain issues.

As with the first phase of Building the Foundation for Commitment, the second phase is still a learning "muddle". If the organization's stakeholders have begun to build the necessary relationship(s) in the first phase and have confidence that they understand what they are undertaking, they can commence an examination of the situation in which they find themselves.

The joint examination of what the alternatives are, of what the changes will mean to the different stakeholders and the assessment of what is required to succeed with the change process is the process that builds the commitment needed to overcome the many difficult undertakings ahead.

Having recognized and agreed upon the need to change the key stakeholders begin to examine their options.

Generally, the stakeholders begin by benchmarking their organization against others.

The accompanying dialogue tool can be used to carry out this comparison.

This is the first tentative step at articulating the principles upon which the remainder of the journey will be based. They will be constantly reviewed and reconfirmed as the stakeholders move forward.

The parties make statements about the principles and values for *themselves*.

The key stakeholders identify and agree to the type and direction of change.

Depending upon the basis for change, the options may range from:

❖ reorganizing the work to considering new or alternative technologies and technical systems to changing the basis for how the organization produces or provides its services.

The key stakeholders, as they build commitment, begin to identify the principles and concepts that will become the core of the Vision Statement and against which they will continuously test their decisions and actions.

The stakeholders must address a series of questions:

- ❖ what commitment is required?
- ❖ what resources are available?
- ❖ what are the risks?
- ❖ what are the barriers?
- ❖ what are the opportunities?
- ❖ what training is necessary?
- ❖ should our commitment be in writing?
- ❖ where do we start?

Start with good projects where there are possibilities of success. Some parts of the organization may be more ready than others.

These successes can build trust and confidence.

A cultural change can heighten resistance and raise unrealistic expectations.

The key stakeholders evaluate their commitment to deal with the ambiguity and uncertainty of change. This can cause pain and dislocation and these consequences must be dealt with. Are they ready to reassess why and how they do what they do and to make a commitment to each other to begin the journey and to stay with the change process?

The objectives will generally form the basis for:
- ❖ the selection of areas of benchmarking, and
- ❖ the foundation of the *Vision Statement*

The key stakeholders must understand what they, individually and collectively, have as objectives for the change.

These objectives may include:
- ❖ greater employment security
- ❖ higher performing organization
- ❖ a stronger, more viable union
- ❖ greater opportunities for participation, ownership and decision making at work
- ❖ power, autonomy and fun
- ❖ increased profitability
- ❖ increased responsibility
- ❖ upgrading skills and knowledge
- ❖ long term survival

Again, this phase is fluid and the stakeholders may move back and forth among the individual components as their knowledge increases.

The new or improved relationship between the stakeholders will foster a shared examination of the alternatives available to the organization. By having carried out a joint assessment of *Readiness to Proceed*, the organization will have built a *Foundation for Commitment* that will make it easier to enter the next major phase in the change process.

This phase of the change process begins and ends with obtaining agreement from the key stakeholders about how the process is proceeding. During this phase, change structures are established, detailed needs are specified and a vision of what the changed organization will look like and how it will function begins to emerge. The foundation that was built in the previous phase begins to be cemented in place by commitments, structures and philosophies that all those involved are committed to support.

This is the start of a commitment to continue to work together. There is an acceptance at this point of a joint responsibility on the part of the key stakeholders to engage in the next steps.

The interests of secondary stakeholders may also need to be reviewed.

If this step is not well done, the stakeholders risk a withdrawal of support or disapproval of the process at a later date.

It requires some explanation of possible outcomes and the establishment of boundaries of where the process might go.

Again, the temptation to become too specific has to be resisted. Much more has yet to be learned as the parties move to strategy design and action.

Future check points are identified.

The key stakeholders commit to each other to move forward to the next step of the change process.

Management may look for executive or first line endorsement; unions may seek national (international) or worker approval.

Resource (money, time and people) commitment is made.

As stakeholders move from one phase to another, they build their commitment to each other and the process. They must therefore ensure that they jointly agree on the basis for proceeding.

Note:

It should be understood that the parties may agree to proceed on the basis of agreement to disagree on certain issues.

Parallel structures are not the only way to proceed.

Some organizations can follow the change process successfully within their existing organizational framework. However, most cannot.

Traditional authority and control relationships often get in the way of developing alternative and/or innovative ways of organizing work.

As an alternative to the normal organizational structure, it may be necessary to establish a new structure, such as the "parallel" arrangement illustrated on the 'A' and 'B' pages that follow.

It is highly desirable that the change process be participative and foster as much involvement as possible from all members of the organization. This is crucial to ensure a high level of commitment and ownership in the final outcome.

This particular structure may be modified to fit the organization's needs, e.g. Steering Committee and Design Team combined or work groups accountable for implementation in place of Study Teams

STEERING
COMMITTEE

- ❖ provides support and resources
- ❖ defines goals, boundaries
- ❖ designates priorities
- ❖ approves design team recommendations
- ❖ ensures consistency with corporate goals

DESIGN
TEAM(S)

- ❖ identifies needs/opportunities
- ❖ prioritizes (with S.C.), forms study teams
- ❖ defines objectives/guidelines for study teams
- ❖ provides assistance to study teams
- ❖ reviews study teams recommendations
- ❖ monitors progress of effort

STUDY
TEAMS

- ❖ fully define issue(s) assigned
- ❖ do necessary organizational analysis
- ❖ develop options to address issue(s) consistent with philosophy
- ❖ do cost/benefit/risk/feasibility analysis
- ❖ develop implementation strategy
- ❖ submit recommendation to Design Team(s)
- ❖ participate in communication

EXTERNAL
CONSULTANTS

- provide information and education during awareness heightening stage
- facilitate establishment of specific needs and development of vision statement
- train organization in use of analytical tools, e.g., technical and social system analysis
- train internal resources so that expertise is developed within the organization
- facilitate Steering Committee and Design Team meetings

INTERNAL
CONSULTANTS

- provide direction, re: process of ongoing design in accordance with philosophy statement
- facilitate work of groups involved in ongoing design
- provide necessary training to develop skills within organization in support of objective of self-management, e.g., problem-solving, decision-making, conflict resolution, communications, etc.
- monitor organization, re: adherence to philosophy statement and plant norms, and provide appropriate feedback
- develop process for corrective action when deviation from philosophy statement and norms are detected
- work with various teams and committees to help them develop effectively
- keep abreast of external happenings and bring back to the organization experiences/learnings of others
- interface with head office and other plants

The change process is "iterative" and needs are likely to be assessed and reassessed because they may have changed during the organizational change process.

The needs analysis refines the member analysis by the stakeholders. (The accompanying assessment instrument can assist with the specific needs.)

The needs may differ for the different stakeholder groups and will likely vary with their own long-term goals. However, the process must be a joint one between the key parties and can serve as a "reality check" on each party's expectations.

Detailed comparisons with comparable organizations, or relevant comparable dimensions in different organizations, will be carried out by careful benchmarking to set realistic and achievable targets.

This is the key analytical step which will chart the move from the abstract (values) to the concrete (facts).

The gap between where the organization is now (current state) and where it wants to be (future state) needs to be clearly understood and articulated. The barriers to "bridging the gap" need to be specifically understood by the parties.

The assessment is not confined to the existing boundaries of the organization. Suppliers, customers and competitors are all important parts of the organizational network. Benchmarking against others is also an important part of the process.

There are alternative ways to achieve the mission or strategic goals of an organization. By stating their vision clearly, the organization's stakeholders make it very clear that there is a particular way that they wish to see the organization accomplish its mission.

As organizations engage in innovative ways of working, there will be very little precedent or experience to guide them through the new situations they will encounter. The vision statement is a philosophy or a set of concepts that can provide guidance each time an unfamiliar situation arises.

The assumptions that lie behind many of the actions and decisions that organizations take are usually not made explicit in traditional organizational arrangements. Vision statements, concepts of how the organization will work, or philosophical statements that describe the beliefs of the members of the organization make the assumptions clear and known to everyone in the organization. If the organization is to move in the direction of having more information sharing and openness and developing more trust, it is necessary for such assumptions and values to be openly stated, cooperatively developed, and accepted.

This statement converts the mission or strategy of the organization into words that reflect how the organization will approach and conduct its everyday and future operations.

Underlying the vision statement of the organization are the values and principles held by the key stakeholders. The remaining stakeholders may or may not be involved in developing the vision statement, but they must accept it and coordinate their own interests to reflect it.

A clear, strong, and acceptable vision statement is an important symbol to the key stakeholder. It represents a commitment to an alternative and desirable way of organizing the workplace.

At this step, legitimacy for the intended direction is sought. Management must provide sanction and understand that it includes a commitment to provide the necessary support in terms of resources and ongoing direction. Unions need similarly to ratify the intended changes with their members and similar processes of sanctioning must be conducted in non-union settings. The key parties must also involve their respective networks, for example, top management, divisional management or the national headquarters of the union, otherwise they may withdraw their support later on in the process.

This is a "reality check" of the intent and direction of the changes against the vision and philosophy.
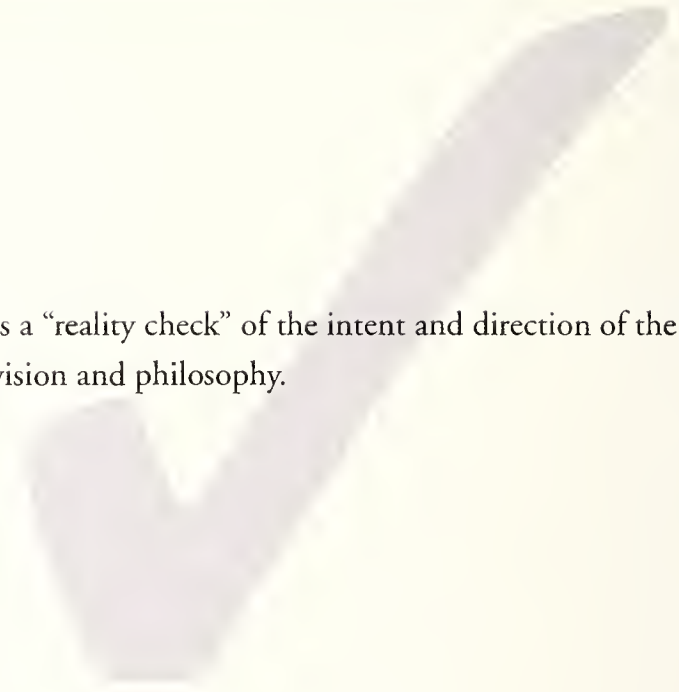
On completion of this
phase, appropriate structures will
be in place to proceed with
detailed changes to the organiza-
tion's functioning. A vision of
what the future organization will
be like will have to be developed.
Specific needs to work towards
will be established. The endorse-
ment of the key stakeholders rein-
forces the existence of a high com-
mitment work organization.

Too many organizations begin the change process at this phase without going through all the earlier stages. This is usually the result of adopting the latest organizational "fad" without thinking through all the steps and stages described in the previous pages. Almost all initiatives that begin at this phase fail, some almost immediately — but never really getting started, others soon after — because neither true commitment nor understanding of the future have been developed.

In this phase, the change process moves on to the detailed process of analyzing existing and intended operations and designing and implementing alternative arrangements to put the changed organization in place.

This is the phase where the detailed work of changing the organization design and implementing the changes takes place. It begins with analysis of existing operations, when they exist, or with the design of new or so-called "greenfield" operations, when the facility is to be a new one.

There are also a range of situations in between existing or "redesign" operations and new or "greenfield" facilities, such as when an existing work force moves to a new location, or when a portion of an existing location is completely restructured and new technology and equipment are installed.

The organization's context is scanned as an important input to the internal analysis.

The flow of the technical system of doing the work is analyzed in detail and key variances that have an impact on effectiveness are determined.

Organizational arrangements are analyzed both in terms of the impact on individual jobs and on the ability of the organization to achieve its goals, to adapt to short term changes, to coordinate its activities and to foster long-term development.

The analysis is conducted with representation from the key stakeholder groups who will also be involved in the design/redesign process and in the implementation of any resulting changes.

To remain effective, organizations must continuously adapt to their changing environments.

Many technical systems have evolved over long periods of time and little attention is paid to the inefficiencies that have accumulated. Technologies now provide many more options for the design of work than we have had in the past.

Social systems are too often analyzed only at the level of individuals and their jobs. It is important to analyze the larger social system and study its impact on the work of the organization.

A good fit between social and technical systems is necessary.

Participation of those who are most familiar with the work is essential to understanding the flow of work.

Redesign should be carried out in consultation with and involvement of those who know about the way work is done - really because they do - and the objectives of the future state. This is crucial in achieving a successful design built from the point of knowledge and... important ownership of the results.

Boundaries and constraints... be respected, e.g. collective agreements between key parties or limits on capital investment. The design/redesign process must take into account the ... and interdependent nature of organizations.

Innovation in organizational design will result from a willingness to undo traditional thinking and to imagine "ideal" ways of organizing.

The designs proposed must be fed back to those who have a stake in them and compared to the needs established through the different levels of analyses.

The intensity of the beliefs held about different design approaches will affect the particular design chosen. So, too, will the committee it elicited from key stakeholders and sanctioning bodies.

Design and redesign must incorporate the input to the people who will actually do the work that is being redesigned.

Some design processes are accomplished through the normal organizational structure; others through parallel structures of steering committees, design and implementation teams or work groups (see pages 25-27, *Establish A Parallel Design Structure*).

The design and redesign process is guided by vision, principles, philosophy statements and specific needs assessment, i.e. How does this redesign "bridge the gaps" between the current and future states?

Organizational structure, support systems, people (knowledge, training and skills), clear role and responsibility definitions, and formal and informal interrelationships between the key stakeholders are some of the key elements the design process must deal with.

The fit between organizational and technical analyses is examined as a basis for the design/redesign process.

This is a comprehensive stage in the process which involves considerable detail where such is necessary, but which constantly strives to leave some flexibility for future change and for the fact that learning systems evolve continuously.

Implementation should be a natural extension of the earlier involvement of all those affected by the proposed changes. Not all members of the analysis and design activities will become members of the implementation stages — but enough will to provide continuity and knowledge of the purposes of the proposed changes.

Monitoring for alignment with design decisions made and with overall philosophy and strategic goals is continuous.

Implementation covers a wide range of activities that may include physical and organizational restructuring, the detailed development of procedures and methods, installation and set-up of new equipment, training, etc. Implementation activities are sometimes tedious and momentum of earlier analysis and design efforts are difficult to maintain.

Implementation is carried out by those who will operate the organization after design or redesign.

Implementation activities are constantly checked against decisions taken and plans and processes developed at earlier stages of the change process.

It is important for "micro-implementations" to occur throughout the change process to provide a sense of purpose and to validate the relatively abstract *Vision Statement* cited earlier.

Since organizations are imbedded in external environments that are constantly changing, they too must change. Within the visions of the future that are likely to arise here, people in the organization will continuously learn. As they do, the situations which surround them will adapt to their learning and change will become a continuous process.

This phase ends with implementation, but since implementation is interdependent with organizational analysis and design/redesign, this phase makes it clear that making changes is a continuous process.

KEEPING IT GOING
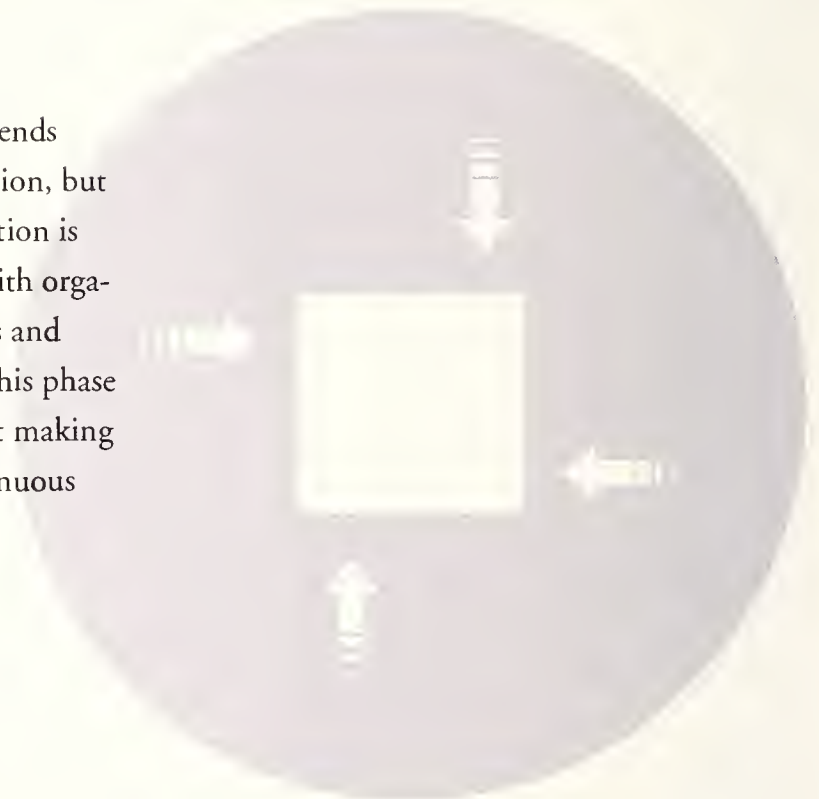
Sustaining change is at least as difficult as initiating and implementing it in the first place. However, it's a different process from that involved with *Making Changes*. It usually calls for different ways of working, different approaches, and sometimes the responsibility for sustaining the change process may shift to different people.

The phase of the change process called *Keeping it Going* refers to the need to sustain what has been accomplished and to continuously monitor progress to ensure that the different targets and goals and ways of organizing are being adhered to.

Evaluation is a process of continuously monitoring the progress of the changes made and comparing the measurements with intermediate and final targets to assess if there continues to be "alignment" with the different targets.

The period of time from the start of the change process to this stage may be quite long and despite the continuous checking along the way, the outcomes can fall short of earlier intentions and be too readily accepted because they're "good enough".

As implementation proceeds, early and ongoing outcomes are monitored and compared with mission and vision statements and with intended designs.

Stakeholders affected by the change process are integral parts of the evaluation step and can provide early feedback on the effectiveness of the changes.
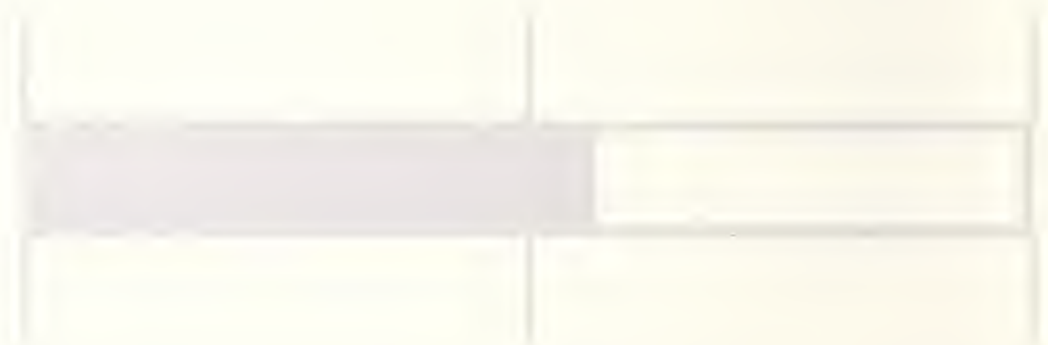
Are the outcomes still in alignment with *Assess Specific Needs*, the *Vision Statement*, the *Endorsement By Key Stakeholders* and all the details developed in the *Making Changes* phase?

It is necessary to continuously check how the change process has affected decisions made at earlier stages and phases of the change process.

Changes should be strongly related to business changes.

The reality of new work organization will change people's expectations.

Ongoing design needs continuous development

❖ some changes will work well

❖ some changes will need revision

There is a need to continuously monitor and adjust.

This phase includes an emphasis on "stock-taking", e.g., by taking representatives (including those of suppliers and customers) off-site to take stock.

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